

OFFICE OF PROCUREMENT

Task/Delivery Order Issuance and Administration
LMS-OP-4524 Revision: I

Approval Original Signed By
Organizational Unit Manager, Office of Procurement
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NASA Langley Research Center (LaRC)
Langley Management System (LMS)

CHANGE RECORD

Rev. No.	Date	Description
B	2/21/01	Revises example in paragraph IV. B.1.c. Incorporates additional order procedures.
C	4/24/02	Clarifies how to number and track orders placed. Removes redundant or obsolete information.
C-1	7/11/02	Adds Section II regarding records. Adds reference to debarment/suspension check in Section IV paragraph B.2.c.4)
D	3/9/03	Clarifies order numbering for orders issued after April 25, 2002 [Section IV paragraph C.2].
E	8/6/03	Updates forms to be used when issuing TO/DO; [Section IV, paragraph B.1.b.] Adds numbering instructions for orders issued after October 1, 2003 [Section IV paragraphs C.1-2.]
F	2/6/04	Adds TO/DO issuing instructions [Section IV, paragraph B.1, g], revises Section IV, paragraphs A.5, B.1, e and B.1, f.
G	6/30/04	Revises paragraph IV. B. by removing references to PIC 98-7.
G-1	8/24/04	Clarifies requirements throughout.
G-2	6/13/06	Clarifies requirements throughout.
H	4/3/07	Paragraph IV, A 11, update to address acceptance of technical input via email. Paragraph IV, B revise process for new CMM software.
I	3/18/08	Add paragraph III.A.13 to ensure that quality sensitive work being performed via task orders contain the appropriate terms and conditions, and quality assurance requirements.

Verify correct revision before use by checking the LMS Web Site

I. Introduction

This document describes the procedures required for the issuance and administration of task and delivery orders.

II. Records

Records generated by this procedure are contained in the Contract Files.

III. Listing of Instruction Topics

A. Complete Package

1. Purchase Requisition
2. Statement of Work
3. Classified Requirements
4. Drawings
5. Government or Budgetary Estimate
6. Completion Date
7. Deliverables and/or End Products
8. Performance Standards
9. Technical Monitor
10. Multiple Awards
11. Contracting Officer's Technical Representative's Approval
12. Special Instructions
13. Quality Sensitive Requirements

B. Order Issuance

1. General
2. Competed Orders under Multiple Award Contracts

C. Order Numbering and Tracking

IV. Instructions

A. Complete Package – The complete package includes the following, as appropriate:

1. A Purchase Requisition (PR) with certified funds. Any PRs providing funding in excess of 2 months of cost into the next fiscal year (cost type orders) must be coordinated with the cognizant program resource analyst.

2. A performance based Statement of Work (SOW). (See <http://ec.msfc.nasa.gov/hq/library/perfba.htm> for guidance in preparing performance based SOWs.)

3. Any sensitive or classified aspects of an order. If an order is classified, a listing of all parties with access to and the methods for transporting the information shall be obtained.

4. Drawings.

5. Government or budgetary estimate if order is over \$200,000.

6. The order completion date/delivery schedule. This schedule shall equate to the time it will take for the contractor to complete all work issued in the task/delivery order.

7. Deliverables and/or end products.

8. Appropriate performance standards, metrics, and/or surveillance plan parameters.

9. The name, phone number, mail stop, and email address of the technical person, assigned by the Contracting Officer's Technical Representative (COTR).

10. The following, if applicable, for orders issued under multiple award type contracts:

a. Sole source rationale, as appropriate per the terms and conditions of the contract and FAR Part 16.

b. Evaluation and selection criteria. Note that simple requirements may be procured requiring the offeror to provide only a price/cost with no selection criteria or a request to provide technical understanding.

11. COTR written approval of the order. Technical input is acceptable via email with no signature on task order evaluations.

12. Any special instructions.

13. Quality Sensitive Requirements. Quality Sensitive work is defined as any activity that falls within the definition of "critical and complex" per NASA Policy Directive (NPD) 8730.5, NASA Quality Assurance Program Policy. Quality sensitive procurements involve the processes and services that support the design, development, fabrication, component assembly, and system installation of flight hardware, flight software, and associated ground support equipment interfacing with flight hardware and flight software. More specifically, the NPD defines "critical and complex" as: (1) any hardware task that, if performed incorrectly or in violation of prescribed requirements, could result in loss of human life, serious injury, loss of mission or loss of a significant mission resource (e.g., Government test or launch facility), (2) the manufacture/fabrication of parts or assemblies which have quality characteristics not wholly visible in the end item and for which conformance can only be established progressively through precise measurements, tests and controls applied. (See also NPR 8735.2A, Management of

Government Quality Assurance Functions for NASA Contracts and NPD 8730.5, NASA Quality Assurance Program Policy, for guidance.)

The process for ensuring that all quality sensitive procurements are reviewed by the Mission Assurance Branch (MAB) from the Office of Safety and Mission Assurance is defined in LMS-CP-4505. This procedure requires all PRs be reviewed for critical and complex work and be designated as quality sensitive in SAP if they meet the definition contained in NPD 8730.5. PRs that are marked quality sensitive will be routed through MAB for review and approval. The review will be documented on LF188, Contract/Purchase Order/Solicitation Quality Assurance Requirements and will be attached to the PR in SAP. The Contract Specialist shall incorporate all applicable quality requirements, as identified on the LF188, into the solicitation/task order. In addition to the quality requirements noted on the LF188, the Contract Specialist shall consider the AS9100 Terms in Conditions located on the “Link” (Langley Office of Procurement webpage) under “AS9100 Requirements” and ensure that all the terms are covered in either the contract or the task order.

The AS9100 standard requires that items be procured only from vendors on an approved supplier list. Considering that Langley Research Center is not in a production environment and that we typically do not make repetitive procurements, our approach is to approve suppliers on every procurement that we process using the additional quality input from MAB, thus meeting the intent of the AS9100 standard.

All quality sensitive procurements shall include a “Q” as the seventh character in the purchase order award number such as>NNL08AQ01P. A separate notebook is available for this specific designation.

B. Order Issuance – The procedures identified within FAR Part 16 and NASA FAR Supplement (NFS) Part 1816, shall be implemented for the issuance of task/delivery orders. The following supplemental procedures apply to orders placed against Langley-issued contracts:

1. General

- a. Only a warranted Contracting Officer (CO) shall sign orders.
- b. Use Standard Form (SF) 1449 for commercial items. Use Optional Form (OF) 347 for all non-commercial actions. Use SF 30 for order modifications.
- c. If the order will be incrementally funded, a total order estimated cost and fee (or price), total authorized cost and fee (or price) funding limitation, and funded through date shall be stated within the order. Consider contract initiatives, milestones and/or surveillance plans when determining that the work required is commensurate with the funds available.
- d. The mechanism(s) established within the contract schedule for determining cost and fee/price reasonableness of proposals shall be used. In those instances where the mechanism does not address how to handle certain elements of a proposal (e.g.

subcontract costs), minimal investigation into the costs' reasonableness must be performed (e.g. comparison of proposed rates to the current Forward Pricing Rate Agreement (FPRA)).

e. The CS shall maintain a record of all orders issued (e.g., excel spreadsheet). Prior to issuing any order action, the order record and the Contract Management Module (CMM) shall be reviewed to ensure the instant action(s) will not exceed contract value.

f. All Task/Delivery Orders shall use the Agency Numbering System and shall be processed in CMM as a stand-alone PO (Exceptions may be approved by the Policy Officer).

2. Competed Orders under Multiple Award Contracts

a. The CO shall provide a solicitation to each awardee and request a bid or proposal by a common cut-off date. (This can range from 1 day for urgent requests to a time frame that would be consistent with the type of supply/service being solicited.) The solicitation will include a SOW, specifications, or drawings; any positive or negative incentives; required delivery date; and any special instructions or provisions. Request that the awardees provide either a firm fixed-price or estimated cost and fee for the proposed order.

The following paragraph is guidance:

For cost-type orders, the CO may require the awardees to provide breakouts of the estimated labor hours or costs to perform the order. In some cases, the awardees may be requested to provide a brief implementation plan for the order. When a large, complex procurement is contemplated, a draft order solicitation may be issued for comment. It also may be beneficial to incorporate provisions in the final document for conducting a preproposal meeting.

b. The customer, not OP, performs a cost/technical trade-off evaluation of each proposal using the selection criteria established. Based on the results of the evaluations, the customer recommends which multiple awardee can provide the "best value." The customer will document the evaluation findings and submit the recommendation to the CO.

c. In selecting the firm with whom to place the order, the CO shall exercise broad discretion and consider:

1) Past performance on earlier tasks under the multiple award contract. Exercise fair judgement in performing this evaluation. Just because a complex order was performed badly, does not necessarily mean exclusion of that contractor for the 5-year contract period of performance. Further, do not exclude a contractor on the basis of not ever performing the type of orders being requested.

2) Quality of deliverables,

3) Cost control and price, and/or

4) Other factors that the CO believes are relevant to the award of an order (i.e. debarment, suspension [FAR 9.405-1(b)]).

d. Upon selection of contractor, the unsuccessful offerors are to be notified.

C. Order Numbering and Tracking

1. The CS shall maintain a record of order numbers placed against each contract.